

## Part Two: W-2 and Related Programs Plan

### Section Two: Program Plan

#### Subsection B: Milwaukee Case Management Agency Response Items

##### 2.B.1 Connect Individuals to Work and Careers

###### 2.B.1.1 Employability Screening

###### Summary:

The CMA must conduct an employability screening for each W-2 applicant. Employability screening entails all of the activities that agencies conduct following an applicant's submittal of a W-2 application to assess applicants' service needs and readiness to participate in up-front job search activities. The information gathered should be comprehensive enough to allow the agency to make a determination of whether assignment to up-front job search is appropriate and what, if any, supportive services are needed to help the applicant obtain employment.

For additional information, Proposers should refer to Administrator's Memos 04-16, *Policy Priorities and Strategies for Achieving W-2 Employment Goals* and 04-19, *W-2 Up-front Workforce Attachment Process*, Chapter 5 of the W-2 Manual and Part One, Section Two of the RFP.

###### Response Item:

- a) Describe how your agency will assess applicants' service needs and readiness to participate in up-front job search.
- b) Describe how your agency will use information gathered through the employability screening process to identify those W-2 applicants who are ready for up-front job search and those applicants who are not. Include in your description the measures indicating job search readiness as well as the path to be taken by applicants who are not ready for up-front job search.
- c) Describe how your agency will share information that is gathered through the employability screening process for those W-2 applicants who are ready for up-front job search with the JDP.
- d) Describe how your agency will use the information gathered through the employability screening process to identify supportive services needed to help the W-2 applicant obtain employment.
- e) What staff, within your agency or within the broader workforce development/job center system will perform the employability screening and what experience and training qualifies them to perform this function.

### **2.B.1.2 Career Planning/Counseling**

#### **Summary:**

The CMA is responsible for developing W-2 applicants' and participants' career plans. Agencies must provide services geared towards assessment of applicants' and participants' career interests and aptitudes. By the end of the career planning process, the plan should include both long and short-term career goals with action steps/objectives and the appropriate combination of services and training needed to achieve each goal.

For additional information, Proposers should refer to Administrator's Memos 04-16, *Policy Priorities and Strategies for Achieving W-2 Employment Goals* and 04-19, *W-2 Up-front Workforce Attachment Process*, Chapters 5 and 9 of the W-2 Manual and Part One, Section Two of the RFP.

#### **Response Items:**

- a) Describe what career planning activities will be offered, when they will be offered and the setting, e.g., individual or group, etc., in which they will be provided.
- b) Describe the tools that your agency will use to conduct career and educational needs assessments.
- c) What staff within your agency or within the broader workforce development/job center system will conduct the career planning activities and educational needs assessments and what experience and training qualifies them to perform these functions.

### **2.B.1.3 Employability Planning**

#### **Summary:**

W-2 policy requires that an Employability Plan (EP) be developed with individuals who are assigned to up-front job search and with those placed in a W-2 employment position. The EP developed during the up-front workforce attachment process should be adjusted and refined to reflect information that has been gathered through the employability screening, career planning and up-front job search activities. While the EP will include a long-term career goal identified through the career planning process, the activities assigned in the EP should continue to be focused on steps to achieve the short-term employment goal.

For additional information, Proposers should refer to Administrator's Memos 04-16, *Policy Priorities and Strategies for Achieving W-2 Employment Goals* and 04-19, *W-2 Up-front Workforce Attachment Process*, Chapter 6 of the W-2 Manual and Part One, Section Two of the RFP.

**Response Items:**

- a) Describe how your agency will use local labor market information, employability screening, career and educational assessments and other informal or formal assessment information in the development of applicants' and participants' EPs.
- b) Describe how your agency will ensure that W-2 participants are assigned activities that address their unique skills, interest, capabilities and other life circumstances.
- c) Describe what staff within your agency or within the broader workforce development/job center system will develop *initial* EPs and what experience and training qualifies them to perform these functions.
- d) Describe what staff within your agency or within the broader workforce development/job center system will maintain *ongoing* EPs and what experience and training qualifies them to perform these functions.

**2.B.1.4 Case Management and W-2 Placement****Summary:**

One of the primary roles of the CMA is to conduct an informal assessment of all W-2 applicants and participants in order to determine appropriate placement in one of the W-2 employment positions on the W-2 ladder (Unsubsidized Employment [CMF,CMU or CMS], Trial Jobs, CSJ and W-2T) and to provide intensive, quality case management services appropriate for each placement.

For additional information, Proposers should refer to Administrator's Memos 04-16, *Policy Priorities and Strategies for Achieving W-2 Employment Goals* and 04-20, *Strategic Focus in Community Service Jobs*, the W-2 Manual, Chapters 5 and 7 and Part One, Section Two of the RFP.

**Response Items:**

- a) Describe the approach your agency will take to assist W-2 participants in balancing life and work activities and responsibilities.
- b) Describe how your agency will conduct informal assessments prior to making initial and ongoing W-2 placement decisions. In your response cite the specific tools your agency will use and the staff who will be conducting these assessments.
- c) Describe more specific guidelines, beyond the general participant characteristics identified in the W-2 Manual, Chapter 7, through which your agency will determine the appropriateness of each W-2 placement.
- d) Describe how your agency will structure soft-skills CSJ work training sites and the benchmarks your agency will develop to

determine the appropriateness of referring these soft-skill CSJ participants to the JDPa for more skills focused or work experience type CSJs. Include in your response your agency's plan for outreach, recruitment and selection of public sector, private sector, for-profit and not-for-profit employers, or community-based organizations for soft-skill CSJ worksites.

- e) Describe how your agency will ensure that each soft-skills CSJ participant is engaged in appropriate activities for as close to 40 hours per week as possible, receives contact-intensive case management services and high quality worksite supervision.
- f) Describe how your agency's case management procedures will differ for participants with serious multiple barriers to employment. Include in your response:
  - 1) In addition to the Barrier Screening Tool (BST), the strategies your agency will employ to ensure that barriers are identified and participants are appropriately referred for formal assessments.
  - 2) The processes your agency will use to ensure that the results of formal assessments are used to determine appropriate W-2 placement, activities and necessary accommodations.
  - 3) How your agency will ensure that these participants are engaged in appropriate activities that directly address their barriers.
  - 4) How your agency will determine which multiple barriered participants are appropriate for employment.
  - 5) How your agency will determine which multiple barriered participants are appropriate for referral to the SSI Advocacy Agency.
- g) Describe the plan your agency will use for making education available to W-2 participants. Include in your plan:
  - 1) How you will identify and address the educational needs of W-2 participants.
  - 2) How your agency will emphasize appropriate educational activities that focus on basic education, literacy, ESL, and continuing education services.
  - 3) Describe how your agency will foster effective partnerships with the technical colleges, UW-Extension, local school districts, volunteer literacy providers and other providers of educational services, e.g., refugee employment and training agencies, that will deliver basic education, literacy and ESL and continuing education services.

- h) Describe the process your agency FEPs will use to monitor the participation and progress of each W-2 participant.
- i) Provide an example of a participant flow through your agency and examples of the service strategies you will provide for each group identified in 1) through 4) below:
  - 1) CSJ participants in need of soft-skills training (mandatory weekly contact);
  - 2) 18 & 19 year old CSJ participants enrolled in high school full time or its equivalent;
  - 3) W-2T participants; and
  - 4) Custodial Parent of an Infant (CMC) participants.

## **2.B.2 Provide Employment Stabilization Services**

### **2.B.2.1 Workforce Support Services to Assist with Employment Stabilization**

#### **Summary:**

Employment stabilization means keeping recently employed W-2 participants connected to the workforce. The W-2 Contract Agency must provide an array of services that assist participants in retaining their current job or providing services to rapidly reattach them to the workforce if the job is lost.

Applicants who meet financial and non-financial eligibility for W-2 and are successful in obtaining employment must be offered services through the appropriate W-2 placement: prorated CSJ, CMF and CMU. Based on the needs and request of the individual, stabilization services should range from touch-base meetings to evaluating job status and needed supports to a more intensive approach, including services geared toward assisting a participant balancing life and work responsibilities, adult basic education, transportation, child care and career advancement services, e.g., ongoing career planning, further education, etc.

For additional information, Proposers should refer to Chapter 7 of the W-2 Manual and Part One, Section Two of the RFP.

#### **Response Items:**

- a) Describe how your agency will determine an employed W-2 participant's need for employment stabilization services.
- b) Describe the different types of services that will be offered to employed W-2 participants. At a minimum, for each type of employed W-2 participant (prorated CSJ, CMU and CMF), your response must address supportive service types, services geared toward assisting a participant in balancing family and work

responsibilities, financial literacy, transportation, child care, adult basic education and career advancement services, (e.g., ongoing career planning, further education, etc.)

- c) Describe what staff within your agency or within the broader workforce development/job center system will provide workforce support services to assist with employment stabilization to employed W-2 participants and what experience and training qualifies them to perform these functions.

### **2.B.3 Integration of Services**

#### **Summary:**

W-2 and Related Programs must be fully integrated into a Job Center system. In addition to integration into the Job Center system, W-2 Contract Agencies must establish and maintain effective relationships with other workforce system programs and other service providers serving families in common. Integration of services across programs and providers will ensure customized case management services to families in common, reduce duplication of effort across agency roles, and result in better and more rapid employment attachment.

Include in your response your agency's plan and timeline for collaborating with all identified service providers throughout the contract period.

For additional information, Proposers should refer to Chapter 18 in the W-2 Manual and Sections 2.10, 2.11 and 2.12 of About the RFP.

#### **Response Items:**

##### **2.B.3.1 Service Integration with the Public Workforce System**

- a) Describe your agency's approach to establishing and maintaining effective working relationships with other employment and training service providers, including but not limited to:
- DVR;
  - adult education administered by the technical colleges;
  - adult literacy providers;
  - the local Job Center employer relations team;
  - other local and regional community based organizations; and
  - any other employment and training providers in the public workforce system, e.g., Refugee Employment and Training.
- b) Describe how your agency will identify and coordinate the services and activities being provided to a W-2 participant by other employment and training service providers, including but not limited to:
- DVR;
  - adult education administered by the technical colleges;

- adult literacy providers;
  - the local Job Center employer relations team;
  - other local and regional community based organizations; and
  - any other employment and training providers in the public workforce system, e.g., Refugee Employment and Training.
- c) Describe how you will involve the Workforce Development Board (WDB) in the process of planning, implementing and operating the program prior to and during the contract period. In addition to providing a response to this item, Form 12 of this RFP must also be included with the proposal.

**2.B.3.2 Service Integration with Other Workforce Support Service Providers**

- a) Describe how your agency will collaborate with the programs administered by Milwaukee County Department of Health and Human Services, including FoodShare, Medicaid, child support, and child care administration.
- b) Describe the resources in the community your agency collaborates with to provide workforce support services to assist W-2 participants in addressing family and work-related needs, i.e., Housing Authority, domestic violence programs, Community Steering Committee, schools, and other service providers identified in the Children's Services Network.
- c) Describe how your agency will identify and coordinate the services and activities being provided to a W-2 participant by each workforce support service provider identified in Response Items a. and b. within this subsection.

**2.B.3.3 Service Integration with Bureau of Milwaukee Child Welfare**

- a) Describe the process your agency will use to integrate W-2 services with in-home child welfare safety services for families receiving services from both BMCW and the CMA.
- b) Describe the process your agency will use to integrate W-2 services with out-of-home child welfare safety services for families receiving services from both BMCW and the CMA.
- c) Describe the plan your agency will use to ensure that your agency is included in BMCW coordinated service team meetings (monthly for safety services, quarterly for out-of-home placements) to discuss service strategies and joint case management planning.
- d) Describe the process you will develop to share relevant assessments and coordinate referrals to services needed, such as AODA, Mental Health and other service providers selected by the Department of Workforce Development and contained within the

Preferred Provider Registry. This includes ensuring that services provided by both systems are not duplicated.

#### **2.B.4 FoodShare Employment and Training (FSET)**

##### **Summary:**

The CMA must operate the FSET program. The Agency must provide services that will enable Able-Bodied Adults Without Dependents (ABAWD) and non-ABAWD FSET participants to meet all federal and state requirements for maintaining their eligibility for food stamps.

##### **Response Items:**

- a) Describe how the FSET program and the W-2 program will interface with each other.
- b) Describe how your agency will coordinate and monitor FSET referral, disenrollment, sanction processes and ABAWD strikes with the Milwaukee County Department of Health and Human Services.
- c) Describe your agency's process for enrolling and engaging participants in the required and appropriate FSET components/activities, and monitoring to ensure full engagement of each under the Department's program policies.
- d) Describe the program services your agency plans to provide to FSET participants.
- e) Describe your agency's plan for determining which FSET participants are appropriate for referral to the JDPA for services.

#### **2.B.5 Dispute Resolution Process**

##### **Summary:**

The W-2 Contract agency must establish the appropriate dispute resolution process for applicants or participants to request a review of the W-2 Contract Agency's actions.

For additional information, Proposers should refer to Chapter 19 of the W-2 Manual.

##### **Response Items:**

- a) Describe your agency's plan for resolving disputes and conducting Fact Findings including but not limited to your internal procedures for accepting a Fact Finding request so that it ensures:
  - an easy, workable method for applicants and participants to request a Fact Finding; and
  - that applicants and participants understand the deadline for submitting Fact Finding requests.
- b) Describe how your agency will advise W-2 participants of their right to appeal denial or termination decisions.



- c) Describe how your agency will ensure the Fact Finder's independence and knowledge of the W-2 and Related Programs.

## **2.B.6 Minor Parents**

### **Summary:**

The W-2 Contract Agency must provide services that will support minor parents' completion of high school and career development.

For additional information, Proposers should refer to Chapter 14 of the W-2 Manual.

### **Response Items:**

- a) Describe your agency's plan for services for minor parents. Include a list and brief description of the types of services that will be offered to minor parents by your agency and the methods for providing those services.

## **2.B.7 Refugee Assistance Program (RAP)**

### **Summary:**

The W-2 Contract Agency must administer Refugee Assistance Programs (RAP); Refugee Cash Assistance (RCA) and Refugee Medical Assistance (RMA), to eligible refugees in accordance with RAP guidance found in Chapter 20 of the W-2 program manual, applicable portions of Administrator's Memos 04-02 and 04-22, Operations Memo 04-36, Federal rules and regulations, and related RAP written program guidance found on the DWD Immigration Integration Section internet site:

### **Response Items:**

- a) Describe how your agency plans to administer RCA and RMA eligibility determinations, including who will determine eligibility, how the language needs of arriving refugees will be met, how services will be coordinated with voluntary resettlement agencies (Volags), FSET and refugee employment and training providers, and how applicants will be referred to refugee employment and training service providers.
- b) Describe the process your agency will use to develop written procedural agreements and plans, where appropriate, with Volags, refugee employment and training providers, community based, and other organizations as necessary to ensure RAP eligible refugees receive appropriate support and services.

## **2.B.8 Quality Assurance/Improvement Monitoring**

### **Summary:**

All W-2 Contract Agencies must implement an internal monitoring system to assure oversight of the agency's performance of W-2 and Related Programs, including systematic identification and implementation of improvements needed, regular reviews of performance standards outcomes and contract compliance, and timely notification to the DWD Contract Manager of performance problems.

**Response Items:**

- a) Describe your agency's plan for monitoring the following areas:
  - 1) W-2 and Related Programs Contract compliance, including DWD W-2 Program Policies and Procedures;
  - 2) W-2 and Related Programs Plan;
  - 3) Performance Standards;
  - 4) W-2 Program Focus (as stated in Part One, Section 1.2 About the RFP); and
  - 5) Participant case files (to ensure adequate documentation).
- b) For each of the above five (5) key areas, respond to the following as they relate to your plan:
  - Frequency of reviews;
  - Staff position titles that lead and/or participate in reviews and their roles;
  - Tools utilized;
  - Measures utilized to gauge success, including those beyond the Department's requirements;
  - Process used in the event that improvements or required action are identified by the agency, providing timely notification to the DWD Contract Manager; and
  - Process used in the event that a need for corrective action is identified by the Department.
- c) Describe your agency's plan to use information from the quality assurance/improvement monitoring process described above, DWD monitoring, and other sources such as customer feedback, complaints, Fact Finding process, etc. to assess agency performance and make improvements.
- d) Describe your agency's plan to ensure that changes made to improve program delivery are effective. In addition, explain how your agency will provide this information to the Department.

**2.B.9 W-2 Program Guarantees****Summary:**

The W-2 and Related Programs Contract must be administered in accordance with all applicable laws, codes, policies and procedures. All Proposers must complete Form 11, *W-2 Program Guarantees*, found in this RFP. By completing the form, you are agreeing that you will comply with all applicable laws, codes, policies and procedures of which you receive notice, including, but not limited to, those found in the following documents:

Wisconsin Statutes  
Wisconsin Administrative Code  
W-2 Manual  
CARES Guide  
Operations Memos

Administrator's Memos  
Income Maintenance Manual (IMM)  
Child Care Manual  
Other written departmental guidance

In addition, W-2 Contract Agencies must have written procedures available for review by the Department upon request.

**Response Items:**

Proposers must complete and sign Form 11, *W-2 Program Guarantees* found in this RFP.

**2.B.10 Projected Outcomes**

**Summary:**

A rapid workforce attachment focus which includes short term, employer driven, customized training and effective SSI/SSDI Advocacy will enable the W-2 Contract Agency to maximize available resources and move individuals into work or onto SSI/SSDI more quickly. The W-2 Contract Agency must closely monitor their W-2 and Related Programs plan to ensure that the plan results in positive outcomes for W-2 applicants and participants.

**Response Items:**

W-2 Contract Agencies selected for the next contract period will be required to complete a Projected Outcomes plan for the first 24-month period of the contract and submit the plan to their Contract Manager within 90 days of the Letter of Intent to Award the Contract. A form similar to the sample below will be provided.

	2006											
	Jan	Feb	Mar	April	May	June	Jul	Aug	Sep	Oct	Nov	Dec
Entered Employments												
Average Wage at Placement												
Individuals Remaining Employed over Six Months												
Individuals Obtaining Employment within 30 days of Completing Job Skills Training												
Approvals for SSI/SSDI												

	2007											
	Jan	Feb	Mar	April	May	June	Jul	Aug	Sep	Oct	Nov	Dec
Entered Employments												
Average Wage at Placement												
Individuals Remaining Employed over Six Months												
Individuals Obtaining Employment within 30 days of Completing Job Skills Training												
Approvals for SSI/SSDI												